

Gov Info Without Tears:

Tax information online from the IRS

Freya Anderson, Head of Information Services

Daniel Cornwall, Internet & Technology Consultant

Alaska State Library

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Resources mentioned here available at

<http://lam.alaska.gov/govinfowithouttears/taxes>

Help without Advice

Tax Reference Services

Fear not

- Professional ethics, guidelines, and best practices dictate that librarians not provide legal advice, but...
- ...the chances of being sued for this are vanishingly small.
- So, focus on the user.
- http://www.aallnet.org/mm/Publications/Illj/LLJ-Archives/Vol-94/pub_Illj_v94n01/2002-08.pdf



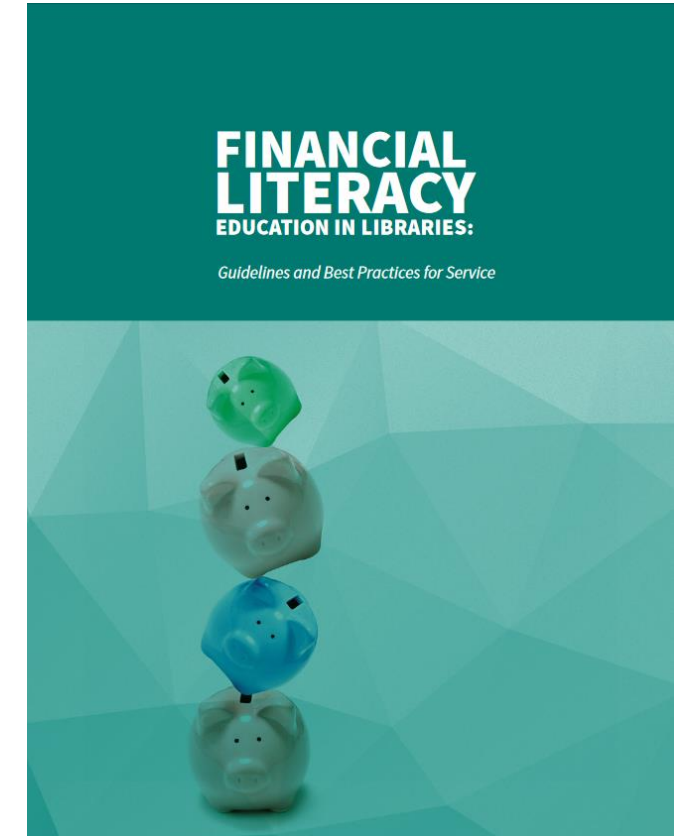
RUSA Guidelines for Business Information Responses

- Share appropriate resources for forms and guidance
- Show how to use resources
- ACCEPTABLE ADVICE TO USER:
 - Strengths and weaknesses of sources, and comparisons with other sources
 - Which sources are the most complete, or best fit the time frame of the user
 - How to find additional assistance

<http://www.ala.org/rusa/resources/guidelines/business>

RUSA: Financial Literacy: Education in Libraries: Guidelines and Best Practices for Service

- Guidelines:
 - Earning Guideline
 - Borrowing and Credit Guideline
 - Saving and Investing Guideline
 - Spending Guideline
 - Protecting Against Risk Guideline
- Best practices:
 - Use unbiased and authoritative sources. Guarantee anonymity. Prevent solicitation. Maintain boundaries. See link for more.



http://www.ala.org/rusa/sites/ala.org.rusa/files/content/FLEGuidelines_Final_September_2014.pdf

lib2gov.org: Legal Issues Resource

- Guidelines:
 - Provide information, but don't interpret it
 - Explain processes, but don't say which to use
 - Locate forms, but don't select specific forms
 - Refer to an expert, but not a specific expert
 - Do not click e-signature links or type personal information for users
 - Includes sample responses

<http://lib2gov.org/e-government-in-your-library/legal-issues-resource>

lib2gov.org: More legal issues

- Maintain network security, especially if users may use your computers for filing
- Set cache to clear automatically regularly
- For privacy, try to avoid seeing personal information
- Inform users of potential network security shortcomings, and the risks they're taking
- See more information and sample disclaimers at <http://lib2gov.org/e-government-in-your-library/legal-issues-resource>

Takeaways

- Don't worry, be happy!
- Tell people about sources
- Follow general reference guidelines
- Be especially careful about privacy and confidentiality
- Be flexible and help your users
- Don't click!
- See webinar guide for these and more resources, including sources for referrals

www.irs.gov: Filing taxes:
Before, during and after

Before you file

- Free File (< \$64,000 from 3rd parties, otherwise fillable forms)
- Forms and Publications
- Automated Interactive Tax Assistant

Free File

The screenshot shows the IRS website homepage. At the top is the IRS logo and navigation links for Subscriptions, Language, and Information For... A search bar is also present. Below the navigation bar is a row of tabs: Filing, Payments, Refunds, Credits & Deductions, News & Events, Forms & Pubs, Help & Resources, and for Tax Pros. Below the tabs are four large buttons: File Your Tax Return, Get Your Refund Status, Pay Your Tax Bill, and IRS.gov En Español. Below these are four main sections: Forms and Pubs, Hot Topics, Tools, and Filing & Payment. The Tools section has a blue arrow pointing to the 'Free File' option. The Filing & Payment section includes logos for where's my refund?, freefile, IRS e-file, and EFTPS. At the bottom is a row of tabs: News, Tax Time Guide, Tax Info, Unclaimed Refunds, Scams, Exempt Orgs, and Social Media.

IRS

Subscriptions Language Information For...

Search Advanced

Filing Payments Refunds Credits & Deductions News & Events Forms & Pubs Help & Resources for Tax Pros

File Your Tax Return

Get Your Refund Status

Pay Your Tax Bill

IRS.gov En Español

Forms and Pubs

- › 1040
- › 1040EZ
- › W-4
- › W-9
- › 1099-MISC
- › More ...
- › Pub 15
- › Pub 17
- › W-7
- › Tax Table
- › Find Forms

Hot Topics

- › Key changes for 2017
- › Get free tax preparation help
- › Electronic filing options
- › ITIN renewal
- › Affordable Care Act
- › More ...

Tools

- › Get answers to your tax questions
- › Free File to go
- › Apply for an online payment plan
- › Get a tax transcript
- › Apply for an EIN
- › More ...

Filing & Payment

where's my refund?

freefile

IRS e-file

EFTPS

News

Tax Time Guide Tax Info Unclaimed Refunds Scams Exempt Orgs Social Media

Free File: Choose your income option

70% of taxpayers per IRS

Income below \$64,000: Free File Software

- File your taxes with free, easy to use software
- Free state return options are available
- Use the [Free File Software Lookup Tool](#) to find free federal and free state return options

START
Free File Now



Free File Software

- [How to use Free File \(PDF\)](#)
- [What you need to get started](#)
- [Validate your return](#)
- [E-file your extension](#)

Income above \$64,000: Free File Fillable Forms

- Must know how to do your taxes yourself
- Does math; offers only basic guidance
- You must have your 2015 Tax Return
- State tax prep is not available
- E-file a free extension

START
Fillable Forms Now



Cautions

- Not all forms supported
- Check computer requirements
- Easy(ish) to lose account through typos

Free File Fillable Forms

- [Military & foreign filers](#)
- [User Guide \(PDF\)](#)
- [Validate your return](#)
- [Minimum Computer Requirements](#)
- [Available Forms & Limitations](#)
- [Help](#)

Free File: Fillable form example

The image shows a screenshot of a tax form with various lines for reporting income and deductions. Red arrows and boxes highlight specific interactive features:

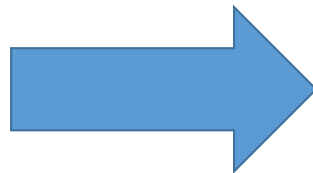
- Drop Down Menu:** Points to the dropdown menu on line 7 (Wages, salaries, tips).
- Manual Entry Fields:** Points to the manual entry fields on lines 10 (Taxable refunds, credits, and other tax-exempt income) and 11 (Alimony received).
- Calculated field:** Points to the calculated field on line 21 (Other income, List type and amount), which shows the value 200.
- Additional Information Fields:** Points to the additional information fields on lines 15a (IRA distributions), 16a (Pensions and annuities), and 19 (Unemployment compensation).

Line	Description	Form Field	Value
7	Wages, salaries, tips	DPC	
8a	Taxable interest, Attach Schedule B	PRI	
b	Tax-exempt interest	BSH	
9a	Ordinary dividends, Attach Schedule B	PSO	
b	Qualified dividends	SCH	
10	Taxable refunds, credits, and other tax-exempt income	FEC	
11	Alimony received	EXCESS ALLOWANCE	
12	Business income or (loss), Attach Schedule C	P8919	
13	Capital gain or (loss), Attach Schedule D	DCB	
14	Other gains or (losses), Attach Schedule E	AB	
15a	IRA distributions	SNE	
16a	Pensions and annuities	PYAB	
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E		
18	Farm income or (loss), Attach Schedule F		
19	Unemployment compensation		
20a	Social security benefits		
21	Other income. List type and amount		200
22	Combine the amounts in the far right column for lines 7 through 21. This is your total income *		

Forms & Publications

Direct links to
current year PDFs.
May be slower on
rural connections.

Click on “more” for
menu and access
to prior year’s
forms and pubs.



Forms & Publications: There's more!

Search

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- › Search Prior Year Forms & Pubs

Browse

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Forms & Publications



CURRENT

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EBOOKS

Use our **Forms & Publications Search** to quickly find and download **current forms, instructions and publications**. To get started, enter keywords into the box below and click Search.

Search

Featured Forms & Publications

List of Current Forms & Pubs >

INDIVIDUALS



[Form 1040](#)

US Individual Income Tax Return

Annual income tax return filed by citizens or residents of the United States.

Related: [Instructions for Form 1040](#), [Instructions for 1040 Tax Table](#), [Schedule A \(Form 1040\)](#), [Schedule C \(Form 1040\)](#)

IRS Tax Map

A useful subject-oriented database for taxpayers

Search Your Tax Map Topic Now >



Free File...

Free software or Free File Fillable Forms.

e-File Your Return for Free >

Forms & Publications: There's more!

Your Federal Income Tax

BUSINESSES



[Form 941](#)

Employer's Quarterly Federal Tax Return

Employers who withhold income taxes, social security tax, or Medicare tax from employee's paychecks or who must pay the employer's portion of social security or Medicare tax.

Related: [Instructions for Form 941](#)

[Form W-4](#)

Employee's Withholding Allowance Certificate

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.

Related: [Form W-4P](#), [Form W-4V](#)

[Form W-2](#)

Wage and Tax Statement

Employers must file a Form W-2 for each employee from whom income, social security, or Medicare tax was withheld.

Related: [General Instructions for Forms W-2 and W-3](#)

[Form SS-4](#)

Application for Employer Identification Number (EIN)

Use this form to apply for an employer identification number (EIN).

Related: [Instructions for Form SS-4](#)

Machine generated tax advice: ITA



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File Your
Tax Return



Get Your
Refund Status



Pay Your
Tax Bill



IRS.gov
En Español

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Filing & Payment

where's
my **refund?**

freefile


efile

EFTPS

Machine generated tax advice: ITA



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IRS Tax Map

A useful subject-oriented database for taxpayers

Search Your Tax Map
Topic Now



Interactive Tax Assistant (ITA)



[Español](#)

The ITA tool is a tax law resource that takes you through a series of questions and provides you with responses to tax law questions.

You can find topics using the search feature or by viewing the categories listed below.

To search the Interactive Tax Assistant (ITA), enter your search terms or questions in the box below.

ITA Search



Most Popular Topics

- [Do I Need to File a Tax Return?](#)
- [Who Can I Claim as a Dependent?](#)
- [What Is My Filing Status?](#)
- [How Much Is My Standard Deduction?](#)
- [Am I Eligible to Claim an Education Credit?](#)

Topics by Category



Keep more...

of what you earned with an
Earned Income Tax Credit

Find Out If You Qualify
For an EITC This Year



Interactive Tax Assistant (ITA): General Questions

General Filing Questions

- [Am I Eligible to Apply for an Individual Taxpayer Identification Number?](#)
- [Do I Need to File a Tax Return?](#)
- [What Is My Filing Status?](#)
- [Who Can I Claim as a Dependent?](#)
- [How Do I File a Deceased Person's Tax Return?](#)
- [What Is the Due Date of My Federal Tax Return or Am I Eligible to Request an Extension?](#)
- [What Is the Simplest Form to Use to File My Taxes?](#)
- [Can I Claim My Personal and/or Spousal Exemption?](#)
- [How Much Can I Deduct for Each Exemption I Claim?](#)
- [Can I or My Spouse Claim Part of a Refund Being Applied Toward a Debt Owed by the Other Spouse?](#)

Answers to Your General Filing Questions

What is my filing status?

Your filing status is married filing jointly



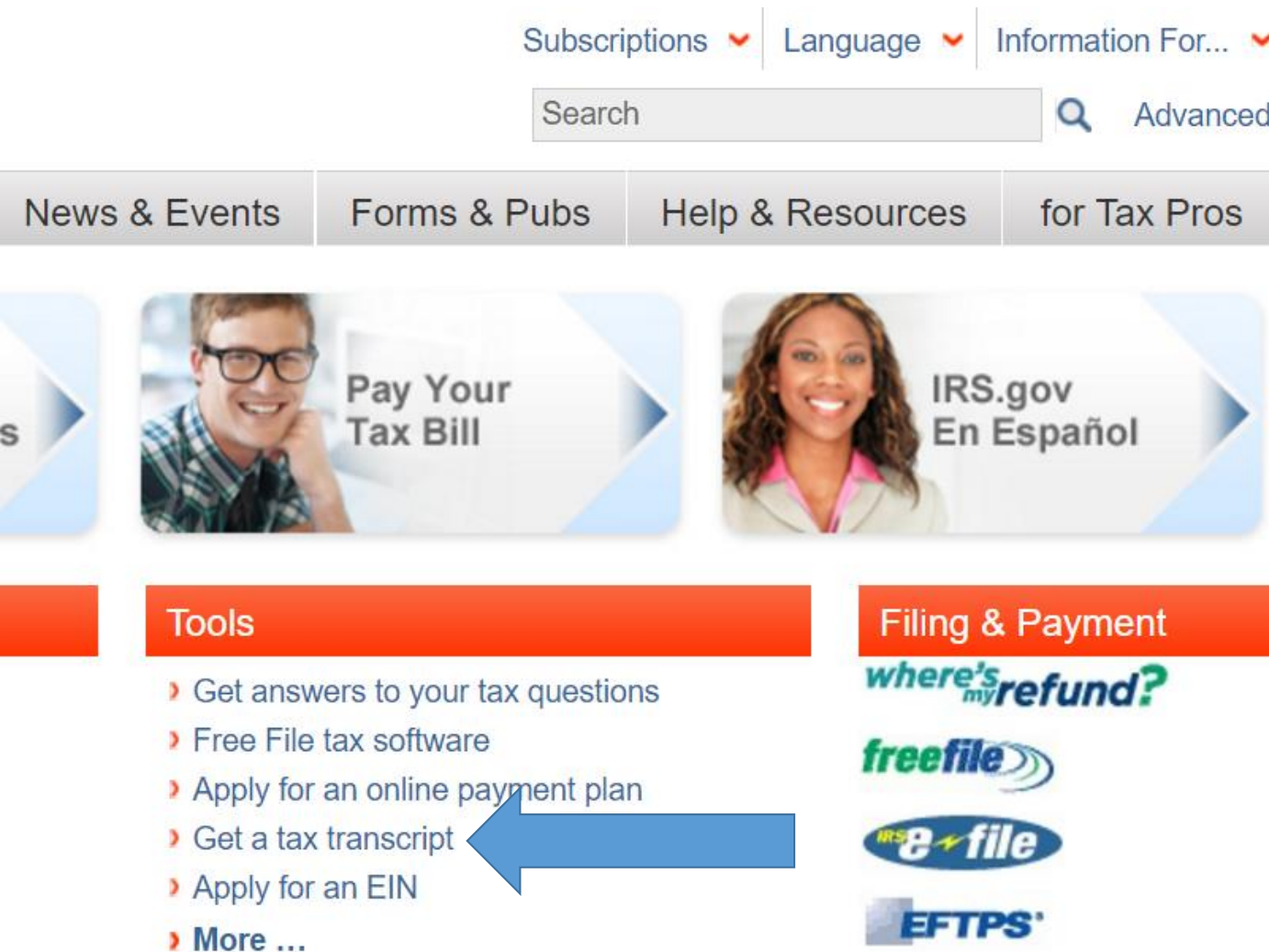
[Printer-Friendly](#)

- Interviews can take 5 - 20 minutes or more.
- Come with documents.
- One question per screen.
- Probably better off with browse than search.

During (solving common problems)

- I lost my W2s
 - Get a tax transcript
- I need a prior year form
 - Look for prior year tab
- The instructions are too small to read!
 - Accessible form and publications

No W-2s? No problem! – Tax transcripts



Wage and Income Transcript

Info you need to get it online: SSN or Individual Tax Identification Number (ITIN), date of birth, and mailing address from your latest tax return, PLUS additional information to verify identity.

Info you get: Data from forms W-2, 1099, 1098 and Form 5498, IRA Contribution Information.

Need a Prior Year Form? It's All About Tabs



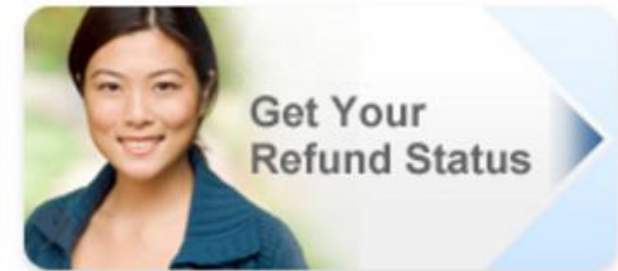
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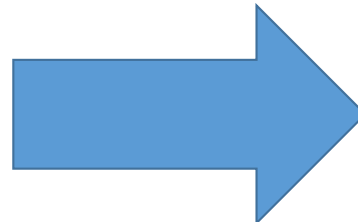


Forms and Pubs

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Prior Year Forms: It's All About The Tabs

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Prior Year Forms: It's All About The Tabs

Previous year's forms can go back as far as initial publication. 1913 for 1040s.

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Featured Forms & Publications

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INDIVIDUALS	
Form 1040 (2015) US Individual Income Tax Return	Annual income tax return filed by citizens or residents of the United States. Related: Instructions for 1040 (2015)
Form 1040 (2014) US Individual Income Tax Return	Annual income tax return filed by citizens or residents of the United States. Related: Instructions for 1040 (2014)
Form 1040 (2013) US Individual Income Tax Return	Annual income tax return filed by citizens or residents of the United States. Related: Instructions for 1040 (2013)

TO BE FILLED IN BY COLLECTOR.

Form 1040.

TO BE FILLED IN BY INTERNAL REVENUE BUREAU.

List. No.

INCOME TAX.

File No.

..... District of

THE PENALTY
FOR FAILURE TO HAVE THIS RETURN IN
THE HANDS OF THE COLLECTOR OF
INTERNAL REVENUE ON OR BEFORE
MARCH 1 IS \$20 TO \$1,000.

Assessment List

Date received

Page Line

(SEE INSTRUCTIONS ON PAGE 4.)

UNITED STATES INTERNAL REVENUE.

RETURN OF ANNUAL NET INCOME OF INDIVIDUALS.

(As provided by Act of Congress, approved October 3, 1913.)

RETURN OF NET INCOME RECEIVED OR ACCRUED DURING THE YEAR ENDED DECEMBER 31, 191

(FOR THE YEAR 1913, FROM MARCH 1, TO DECEMBER 31.)

Filed by (or for) of
(Full name of individual.) (Street and No.)

in the City, Town, or Post Office of State of
(Fill in pages 2 and 3 before making entries below.)

1. GROSS INCOME (see page 2, line 12)	\$				
2. GENERAL DEDUCTIONS (see page 3, line 7)	\$				
3. NET INCOME	\$				
Deductions and exemptions allowed in computing income subject to the normal tax of 1 per cent.					
4. Dividends and net earnings received or accrued, of corporations, etc., subject to like tax. (See page 2, line 11)	\$				
5. Amount of income on which the normal tax has been deducted and withheld at the source. (See page 2, line 9, column A)					
6. Specific exemption of \$3,000 or \$4,000, as the case may be. (See Instructions 3 and 19)					
Total deductions and exemptions. (Items 4, 5, and 6)					
	\$				
7. TAXABLE INCOME on which the normal tax of 1 per cent is to be calculated. (See Instruction 3)	\$				

1040 from
1913

Form plus
instructions
ran four
pages.

Text too small? Can't see at all? Accessible Pubs Tab on Forms and Publications

Search

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Forms & Publications

♥

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ACCESSIBLE

EBOOKS

Accessible Forms & Publications

The Internal Revenue Service offers content in a variety of file formats to accommodate people who use assistive technology such as screen reading software, refreshable Braille displays, and voice recognition software. We have prepared hundreds of tax forms and publications that can be downloaded or viewed online in text-only, Braille ready files, browser-friendly HTML, accessible PDF, and large print.

To download these files, use the following links:

• [Disability Related Products](#)

• [Accessible PDF Forms](#)

• [Braille and Text Formats - Tax Forms and Instructions](#)

• [Braille and Text Formats - Tax Publications](#)

• [HTML Format - Tax Instructions \(Read Online\)](#)

• [HTML Format - Tax Publications \(Read Online\)](#)

• [Large Print Format - Tax Instructions](#)

• [Large Print Format - Tax Publications](#)

• [E-pub Format - Tax Publications](#)

After you file

- Check your refund status
- Apply for an online payment plan

Checking Refund Status



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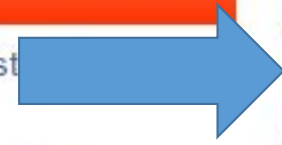
Filing & Payment

where's my refund?

freefile

efile

EFTPS



Where's My Refund? What You Need

Where's My Refund? - It's Quick, Easy and Secure.



[Español](#) | [中文](#) | [한국어](#) | [Tiếng Việt](#) | [Русский](#)



Using a mobile device? Download the [IRS2Go app](#) to check your refund status.

What you need to check the status of your refund:



Social Security Number,
or ITIN



Filing Status



Exact Refund Amount

Where's My Refund?



Where's My Refund? is updated no more than once every 24 hours, usually overnight.

Takeaways:

- Be prepared with info up front
- Don't bother checking more than once a day

If you must pay, but can't all at once: Apply for an online payment plan



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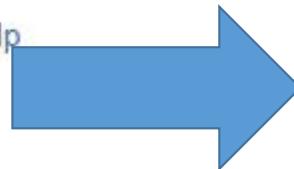


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Filing & Payment

where's my refund?

freefile

IRS e-file

EFTPS

Online Payment Plans

- Available for individuals and businesses
- Patrons should have information in hand before applying
- Be aware of extra costs involved, fee schedule on plan page
- People applying as Power of Attorney have extra requirements

Online Payment Plans

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[Refunds](#)

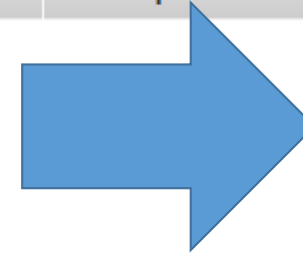
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Apply for an Online Payment Agreement for Individuals and Businesses

[Español](#) | [中文](#) | [한국어](#) | [TiếngViệt](#) | [Русский](#)

This application allows a qualified taxpayer or authorized representative (Power of Attorney) the opportunity to avoid long telephone wait times or the need to visit or write to an IRS office to apply for an installment agreement. Once you complete the online process, you will receive immediate notification of whether your agreement has been approved.

You can also use the links below to revise an existing Online Payment Agreement (unless you have a Direct Debit Installment Agreement) or to modify your e-authentication security profile.

Setup Fees

If we approve your agreement, one of the following fees will be added to your tax bill:

- \$31 for a direct debit agreement established through the On-Line Payment Agreement Application (OPA)
- \$149 for agreements established through OPA and not debited directly from your bank account
- \$107 for a direct debit agreement not

Individuals



Wait! I can't do much online!

- IRS directed by Congress to push people online:
- IRS assistance center
 - Individuals: 800-829-1040
 - Businesses: 800-829-4933
 - People with hearing impairments: 800-829-4059 (TDD)

Wait! I can't do much online! (Cont)

- IRS assistance center
 - Order forms and publications: 1-800-829-3676
 - Considerations:
 - Hold times will be long, especially early April
 - Paper forms may take a few weeks to get to your patrons
- Remember, they can file an automatic extension (Form 4868 or Free File)

Learn more

Find the resources we've discussed here, as well as sources for further learning and your reference, for this and future sessions, at our guide, online at:

- <http://lam.alaska.gov/govinfowithouttears/taxes>